

Agent and Broker Registration Process for the Federally-facilitated Marketplace (FFM): Quick Reference Guide

Part I: Complete training, exams, and execute FFM Agreement(s) on the Medicare Learning Network® (MLN)

The Medicare Learning Network® (MLN) can be accessed at:

<https://Marketplace.MedicareLearningNetworkLMS.com>.

Please note: The training curriculum is not compatible with iPads, tablets, or other handheld/mobile devices.

1. First time users will select “Create Account.” Returning users will log into their existing account and should proceed to Step 5. *(Please note: updates to your User Type/User Role or basic identifying information can be made in the “My Account” area, accessed by clicking your name in the upper right corner of the screen after logging in.)*
2. Self-select your MLN user ID and password; enter basic identifying information, including your National Producer Number (NPN), as prompted. It is vital that you enter your NPN correctly—up to 10 digits, without leading zeroes, and without hyphens—and that you remember your MLN user ID. Select your User Type/User Role based on the market(s) you wish to serve:
 - Agent/Broker/Web-broker – Individual Market and SHOP
 - Agent/Broker/Web-broker – Individual Market
 - Agent/Broker/Web-broker – SHOP

Please note: Your role selection will determine the courses and Agreement(s) you complete.

If you do not know your NPN, you may obtain it at:

<https://pdb.nipr.com/html/PacNpnSearch.html>
3. After you select the appropriate User Type/User Role, the first field, “Organization Type” is automatically grayed-out, because agents and brokers do not need to complete it. Next to the second field, “Organization,” click on the blue text that says “Select.” A new screen will pop up. When that screen appears, click the gray “Search” button, and the Organization named “Marketplace” will appear as the only option. Click the circle to select “Marketplace,” select “Save,” and you will be returned to the previous screen where you can finish creating your MLN account.
4. After you successfully create your MLN account, you will be taken to a “Welcome” page.
5. Click on the “Training Home” tab.
6. The MLN will auto-assign the appropriate curriculum based on the User Type/User Role you selected in Step 2 above. The curriculum will appear under the “My Upcoming Learning” section.

Please note: it may take up to 15 minutes for the MLN to auto-assign your curriculum.
7. Click on the title of the curriculum and then click the “Enroll” button to enroll in the curriculum.
8. Click on “Access Item” to access the curriculum content.
9. Click the title of the first item.
10. Click the “Enroll” button.
11. A new window will open. Click the “Enroll” button. (You may keep the defaults that are already in place for “Course Credit Options” and “Course Mode Options.”)
12. Click the “Open Item” button and proceed with taking the course.
13. The menu page displays the topics in each course. After completing each topic, you will return to the menu page.

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14. Depending on the role you selected, you will be prompted to complete the following:
- For the Individual Market role, you must—
 - Take the “Affordable Care Act and Marketplace Basics” course and pass the exam (required)
 - Take the “Privacy and Security Standards” course and pass the exam (required)
 - Take the “Individual Marketplace” course and pass the exam (required)
 - Read and accept the Agent Broker General Agreement and the Agent Broker Agreement for the FFM Individual Market (required)
 - For the SHOP role, you will be prompted to—
 - Take the “Affordable Care Act and Marketplace Basics” course and pass the exam (highly recommended)
 - Take the “Privacy and Security Standards” course and pass the exam (highly recommended)
 - Take the “Small Business Health Options Program Marketplace (SHOP)” course and pass the exam (highly recommended)
 - Read and accept the Agent Broker Agreement for the FF-SHOP (required)
 - For the Individual Market and SHOP role, you will be prompted to—
 - Take the “Affordable Care Act and Marketplace Basics” course and pass the exam (required)
 - Take the “Privacy and Security Standards” course and pass the exam (required)
 - Take the “Individual Marketplace” course and pass the exam (required)
 - Take the “Small Business Health Options Program Marketplace (SHOP)” course and pass the exam (highly recommended)
 - Read and accept the Agent Broker General Agreement, the Agent Broker Agreement for the FFM Individual Market, and the Agent Broker Agreement for the FF-SHOP (required)

Additional Notes:

- When you return to “Training Home” after logging out, you will see any courses, exams, and Agreements you have started, as well as those you have completed.
- Training may be completed in multiple sessions. From the “Training Home” page, click “Open Item” next to the title of the course you wish to resume. A dialogue box will ask if you want to resume where you left off previously. Click “Ok.” Keep the curriculum completion certificates you receive. You will need to provide copies of these certificates to the issuers and web-brokers with which you are affiliated. You will also see interim confirmation for each course and exam you complete; however, the curriculum certificate—not the interim course completion confirmation—verifies that you have completed all requirements for your role type (Individual Market, SHOP, or Individual Market and SHOP).

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Part II: Create an FFM user account and complete identity proofing through the Centers for Medicare & Medicaid Services (CMS) Enterprise Portal

Part II is required for agents and brokers who wish to operate in the FFM for the individual market and/or the FF-SHOP. *Please note: To allow time for your training results from the MLN site to be transmitted to the CMS Enterprise Portal, you must generally wait at least two business days after completing training and exams, and executing the FFM Agreement(s) on the MLN website. However, agents and brokers who completed Part II of registration for the 2014 plan year will only complete Part I to participate in the FFM during the 2015 plan year. Agents and brokers who completed Part II of registration for the 2014 plan year do NOT need to complete Part II again for the 2015 plan year.*

1. Go to the CMS Enterprise Portal at: <https://portal.cms.gov/> and select “New User Registration.”
2. As a result of selecting “New User Registration,” the CMS Enterprise Identity Management (EIDM) system on the CMS Enterprise Portal will prompt you to agree to the EIDM terms and conditions. Click to agree, and then click “Next.”
3. Enter basic identifying information on the “Your Information” page, and click “Next.” Please be sure to enter your legal name rather than any nicknames.
4. The EIDM system will prompt you to create an FFM user account. Click “Next.” *Please note: Agents and brokers operating in either the FFM for the individual market or the FF-SHOP will use this ID to enroll consumers in the FFM.*
5. Click “Ok” and the EIDM system will redirect you back to the CMS Enterprise Portal page to log back in with your new FFM user ID and password.
6. On the CMS Enterprise Portal home page, select “Login to CMS Secure Portal” and log in with the FFM user ID and password you created in step 4 above. Select “Log In.”
7. Select “Request Access Now” under “Request Access.”
8. You will see a display of different systems. In the “Access Catalog” search field, type “FFM.”
9. Under the FFM system window display, select “Request Access.”
10. Select your role: “FFM Agent Broker.”
11. Enter your NPN and MLN user ID. (It is vital that you enter both of these items accurately, or the system will not be able to confirm the completion of your training.) When finished, click “Submit.”
12. You will be returned to the “My Access” page. Read the explanation under “Remote Identity Proofing,” and click “Next.”
13. Read the “Terms and Conditions.” Click “I agree to the terms and conditions,” and then click “Next.”
14. You will be prompted to enter your identifying information. This information will be used to create the identity proofing questions. Click “Next” when you have finished.
15. You will be prompted to answer the “out-of-wallet” questions.
16. Upon completing the questions, your FFM user ID will be activated and you will be granted the Agent/Broker role.

For more information, please visit:

<http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/assistance.html>
<http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/a-b-resources.html>

There are a number of links and documents on those pages which will help you to learn more about the registration process for agents and brokers in the FFM.